

LVL Technical Assistance (TA) Packet

Date: _____ Store Name: _____

LVL Name: _____ Vendor/Vendor Rep: _____

WIC Local Agency: _____ Store Telephone Number: _____

Store Address: _____

Prep Checklist

Before:

Gathering Materials

What to Bring:

- ☐ Clip board
- ☐ Business Card/Work I.D.
- ☐ Schedule and map of vendor visits
- ☐ Your copy of the WAFL
- ☐ LVL Packet
- ☐ Vendor Packet (for vendor)

☐ FI Transactions: _____ of _____

☐ Health Permit Posted: ☐ Yes ☐ No

☐ Local Health Dept: ☐ Yes ☐ No

☐ Other:

Basic LVL Tool Kit:

- ☐ Current WIC Authorized Foods List
- Shopping Guide (WAFL)
 - ☐ Frequently Asked Questions
 - ☐ How to Order WIC Vendor Materials
- ☐ Minimum Stocking Requirements (w/o cover certification sheet)
- ☐ Rejected Food Instrument Handouts
- ☐ Sample of WIC website/Vendor Resources
- ☐ Shelf Talkers
- ☐ Vendor Alerts/Vendor Bulletins
- ☐ Vendor Contact and Resource List
- ☐ WIC Acronym and Logo Regulations, WIC Bulletin Regulations (WBR) Section 71400
- ☐ Vendor Newsletter
- ☐ Vendor Report Concerning Participants (complaint form)
- ☐ WIC posters/decals
- ☐ Quality Produce Checklist
- ☐ Fresh Produce Talking Points
- ☐ Quality Fresh Produce Q&A
- ☐ Retail and Grocer Resources for Fresh Produce
- ☐ Seasonal Produce Guide

During:

- ☐ Introduce yourself and your role as the LVL to the vendor/vendor rep and provide them with your business card.
- ☐ Discuss current vendor updates with the vendor/vendor rep.
- ☐ Inform the vendor/vendor rep that you will be walking around their store and checking the WIC foods.
- ☐ Complete the Minimum Stocking Requirements (MSR) Checklist in your LVL Packet.
- ☐ Complete the Observations Checklist (OBC) in your LVL Packet, including the review of a maximum of fifty (50) transacted FIs and any observed transactions, if applicable.

↑ LVL PACKET IS FOR LVL USE ONLY ↑

Vendor Packet Procedures

- ☐ Provide vendor with hardcopy of Vendor Packet that includes (2) Vendor Summary Letters (VSL).
- ☐ Review your summary with the vendor/vendor rep. Document any additional information from the discussion, if applicable. If the vendor/vendor rep has further questions, refer him/her to their vendor consultant at 1-855-942-7867.
- ☐ Both the vendor/vendor rep and you will sign two (2) original VSLs. If the vendor/vendor rep refuses to sign VSL, indicate on signature line "Refused to Sign."
- ☐ Leave completed Vendor Packet with the vendor/vendor rep and retain the second original signed VSL for your records.

After:

- ☐ Attach the second original signed VSL to your LVL Packet.

Submit Completed TA Forms

- ☐ Complete electronic copies of the MSR Checklist (**MSR**), Observations Checklist (**OBC**), and Vendor Summary Letter (**VSL**) in Microsoft Word.
- ☐ Name each file according to required naming convention:

Document Abbreviation	Vendor TA ID	period	YYYY-MM-DD	Complete Name:
MSR	30812345	.	2013-10-18	<u>MSR30812345.2013-10-18</u>
- ☐ Send batches of up to 10MB of reports per email to LVLTAReports@cdph.ca.gov

Hardcopy Filing Procedures

- ☐ With exception to entries on items VI. and VIII., report any findings on the OBC by sending an e-scanned copy of your completed form to WICABUSE@cdph.ca.gov or by faxing a copy to (916) 440-5575.
- ☐ File hardcopy or electronic versions of the LVL Packet with attached second original VSL for a minimum of three years.

OPTIONAL – Discretionary Follow-Up TA Visit (within the same quarter)

- ☐ Conduct a TA visit and follow the same documentation and tracking procedures.
- ☐ Refer to notes from previous TA visit to assess vendor's progress.
- ☐ Complete the LVL Packet and complete/issue a Vendor Packet to the vendor/vendor rep.